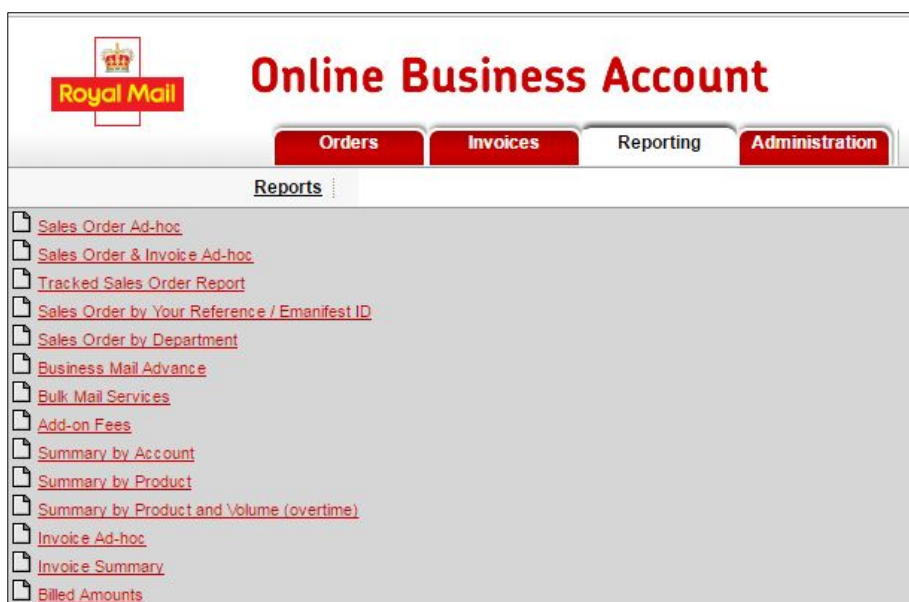




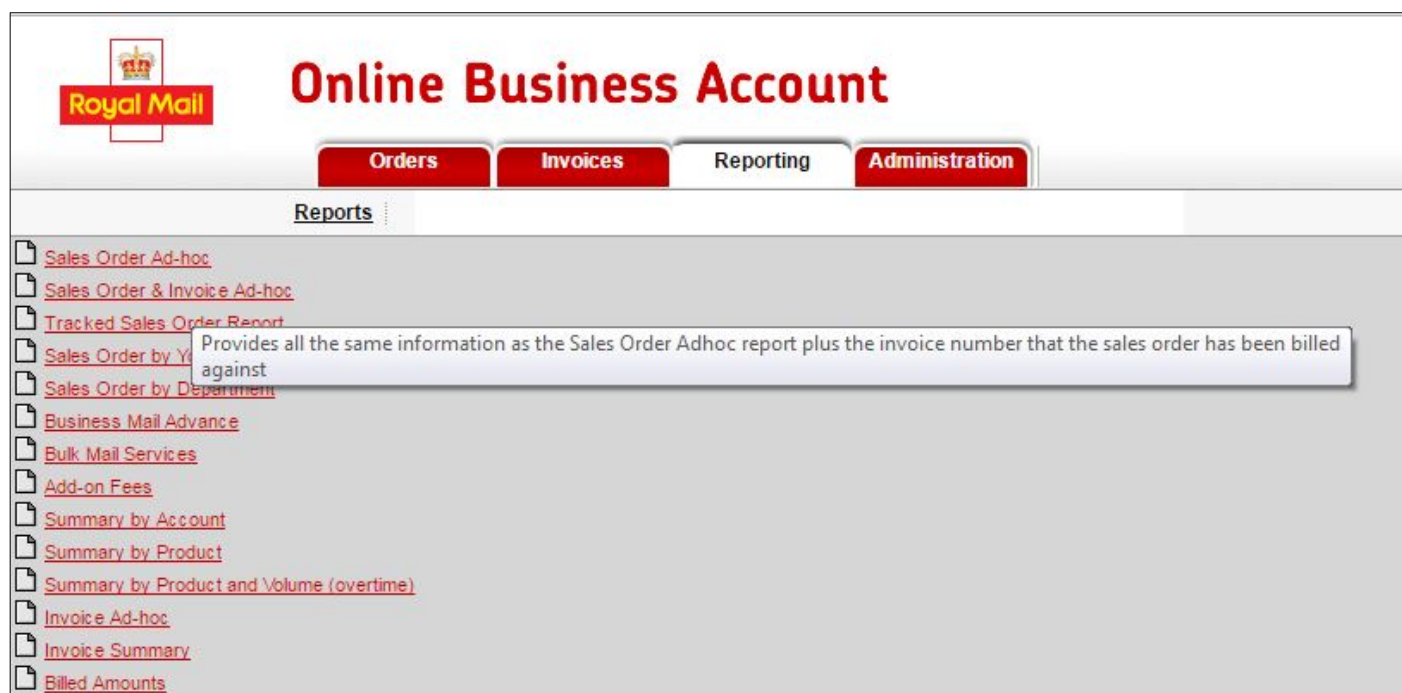
Online Business Account – How to view and download reports

Online Business Account – How to view and download reports

There are a range of reports in the reporting suite that can provide you with information on your mailings including data on volume, value by account, products used, full sales order and invoice data within specified dates.



To find out what data each report can provide, hover your mouse over the report name and a box will appear describing what information can be found within that report:



Using the reports

To run a report, simply click on the report name link and, depending on the report, you'll be presented with selection criteria – this will change depending on the report chosen.

The example right is for the Sales Order Ad-Hoc report.

Available Variants: Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Date		
Sales Order No.		
Account		

OK Check

To enter a date, the easiest and quickest way is to type the date or date range. The date needs to be entered in the format of **dd.mm.yyyy** and if you want to enter a date range, you'll need to enter it in the format of: **dd.mm.yyyy(space)-(space)dd.mm.yyyy**. For example 15.01.2016 – 24.01.2016

Once you've entered the date and any other selection criteria (e.g. account number if you don't want to report on all the accounts you have access to) click 'OK' and the report will return the data matching your selection criteria.

If you use similar search criteria each time, you can save a template of your search criteria, by entering the search criteria and then clicking on 'Save as'. Give your search a name and that criteria will be saved for future use.

Once the report is displayed, you will see the 'Navigation Block'.

The headings shown under the 'Rows' section are fields already shown in the report.

The headings under the 'Free Characteristics' section are fields that can be added to personalise your report.

Selection

Date: 15.01.2016 - 24.01.2016

Navigation Block:

- ▼ Columns
 - Key Figures
 - Date
 - Sales order no.
 - Confirmed by
 - Confirmed Date
 - Confirmed Time
 - Account
 - Poster
 - Postal code
 - Destination Country
 - Product
 - Class of mail
 - Format
 - Magazine issue
 - Magazine code
 - CRN Code
- ▼ Rows
 - Container Type
 - Customer reference
 - Department
 - Line item
 - Sales order type
 - Service register occurrence
 - Your description
 - Your Reference/Emanifest ID

You can add or remove fields in both areas by using the 'drag and drop' functionality.

Simply, place your mouse over the heading that you want to move, left click on your mouse and then - whilst holding the left button down - move the mouse to where you want the heading to be placed. While dragging the heading, you'll see a black line showing the location of where you are moving the new header to.

The field that you have chosen will now show in the report data.



If you don't want to use the 'drag and drop' functionality, there is an alternative: in the body of the report, using your mouse, hover over a column until the symbol changes to a hand symbol and right click in a column.

Destination Country	Product	Class of mail	Format	Magazine issue
Not assigned	CLA BUSINESS MAIL ADVANCED 1C A/C	1	1	#
EUF	OLA INTERNATIONAL STANDARD		#	#
Not assigned	CRL ROYAL MAIL 24V48		4	#
Not assigned	SD1 SD GUARANTEED BY 1PM		#	#
Not assigned	STL 1ST AND 2ND CLASS ACC		1	#
EUF	OLA INTERNATIONAL STANDARD		#	#
Not assigned	CRL ROYAL MAIL 24V48	2	4	#
Not assigned	SD1 SD GUARANTEED BY 1PM	0	#	#

A sub menu will appear allowing you to perform various actions to personalise the report:

Filter

Keep Filter Value - Select the information you want to filter on and this will be applied across the report. For example, if you click on a specific Poster within the Poster column, then the report would refresh to show only the information for the Poster name you have selected. The Poster Column will be removed from view.

Fix Filter Value to Axis - Select the information you want to filter on and this will be applied across the report. For example, if you click on a specific Poster within the Poster column, then the report would refresh to show only the information for the Poster name you have selected. The Poster column will remain in view.

Filter & Drilldown according to - If you want to filter several bits of information, then you can use this function to select several areas of data.

Select Filter Value - If you want to filter to a specific reference field, you can use this filter function.

Change drilldown

Drilldown by - Swap the current column you are in with one of the Free Characteristic options.

Swap 'column header name' with... - Allows you to swap the current column you are in with any of the other column header options.

Remove Drilldown - Returns the report to the original format.

Swap Axis - Will change the report so that the column data becomes the rows and vice versa.

Printed version

Printed version - Provides you with an option to print the report.

Distribute and export

Distribute and export - Allows you to export the report into Excel or CSV formats and provides the option to 'Bookmark' which means you can a new report whilst keeping your original report.

Sort 'column header'

Sort column header - Lets you sort the data in the column either ascending or descending order. Your report is now ready to be used as you need.